

CAPPS HR/Payroll — User Group Meeting Minutes

Tuesday, June 22, 2021

9–11 a.m.

(Webinar Only)

I. Welcome (Saundra Farley)

- User Group meeting materials are posted on FMX.
 - To be added to the user group distribution list, email the CAPPS Governance and Communications team at: CAPPS.CGC.BA@cpa.texas.gov

II. Production Update: HR/Payroll Support Requests (SRs) (Saundra Farley)

- **SR Summary and Trend Report**
 - Reviewed the CAPPS HR/Payroll Summary and Trend Report 06/22/2021 document.
 - There were 653 active SRs with 71 in high-priority status in May.
 - As shown on the trend chart, there were 599 SRs opened and 675 closed.
- **Governance Approved Enhancements**
 - CAPPS HR/Payroll Governance Approved SRs 06/22/2021 document was not shown — no updates to discuss.
- **Required Maintenance**
 - Reviewed the CAPPS HR/Payroll Required Maintenance 06/22/2021 document. Updates since the last meeting are identified with an asterisk(*) and bolded.
 - SR 20334 makes the Notice of Change (NOC) process automatic. User Acceptance Testing (UAT) started June 14 and concludes on July 2. The target date for this SR to move to Production is July 15.
 - SR 27480 is for the direct deposit audit report. This replaces the TINS report (DEP87340) and will be worked in conjunction with SR 20334. UAT is set to begin on June 24 and concludes on July 2. The target date for this SR to move to Production is July 15.
 - SR 27891 is for the FFCRA extension (ARPA) and ties to the ARPA discussion topic presented today. It is in *Acceptance testing* with a Production date of July 1.

III. Upcoming Vote: SRs Submitted to Governance (Rebecca Kelly)

- Reviewed the CAPPS HR/Payroll SRs Submitted to Governance 06/22/2021 document.
- SR 28200 is a Reports and Recruiting module for candidate history details and source yield report and includes filtering by date range and allows candidates without a source indicated.
- SR 28606 is a Reports and Recruiting module to create a new report to list “submissions completed metrics” with Status and Requisition ID for OBI.
- SR 28607 is a Reports and Recruiting module to add another view to the veteran’s details report that allows the export of data without suppressing information on the rows in Recruit OBI.
- SR 28637 is a Reports and Recruiting module for updating the recruiting staff workload report and includes the removal of the total submissions completed measure, update of the number of submissions completed and adding the recruiter’s name to the report.
- SR 28603 is a Reports and Recruiting module that adds views to the requisition details report and adds the start and end date to assist with filtering. Additionally, it allows the display of small data set by key data elements and parameters.

IV. Project Update: CAPPS Fiscal 2021 HR/Payroll Agency Deployment Project Dashboard (Karl Thomason)

- Reviewed the CAPPS Fiscal 2021 HR/Payroll Agency Deployment Project Dashboard 06/22/2021 document.
- Code move date is July 08, 2021. Implementation date is July 12, 2021. The project metrics are on track.
- Key items:
 - Project is now at 89% completion.
 - UAT is now complete.
 - The team is finalizing the soft code freeze and are moving to a hard code freeze.
 - Preparations for go-live are on track.

V. Project Update: CAPPS Fiscal 2021 IAM Agency Deployment Project Dashboard (Diana Urban)

- Reviewed the CAPPS Fiscal 2021 IAM Agency Deployment Project Dashboard 06/22/2021 document.
- The project is green and on track.
- Key items:
 - Project is now at 97% completion.
 - The team reported a successful go-live on June 7.
 - Tasks related to Organizational Change Management (OCM) are complete.
 - Support preparations continues.

VI. Discussion Topic: ARPA Update (Danette McWilliams)

- FFCRA leave processing was separated into two time periods and UAT dates are set:
 - Period 1: April 1, 2020 – March 31, 2021
 - Period 2: April 1, 2021 – Sept. 30, 2021
 - UAT Dates: June 14– 25
- Go-live is set for July 1, 2021.

VII. Discussion Topic: Fiscal Year-End Update (CAPPS Production Support Team)

- The CAPPS team will open an ASP SR for each agency for fiscal year-end. In this ticket, the team provides information, desk aids and additional documents. If you have questions or need assistance for fiscal year-end, please respond in the agency's ticket.
- Important dates for the fiscal year-end processing schedule:
 - Normal processing is available until 5:00 p.m. on Aug. 31, 2021. All transactions processed on Aug. 31, 2021, are sent to SPRS before the CAPPS team begins the fiscal year-end close process.
 - The system will be unavailable from 5:00 p.m. on Aug. 31, 2021, until at 8:00 a.m. on Sept. 3, 2021.
 - Normal CAPPS activities will resume at 8:00 a.m. on Sept. 3, 2021.
- **Before** fiscal year-end close process begins, be aware of these few reminders:
 - If your agency is planning to make Mass Position Changes that are effective Sept. 1, 2021, the CAPPS Production Support staff can provide a template for your agency's use. Request the template in the fiscal year-end ticket.
 - Fiscal 2022 department budgets in CAPPS HR/Payroll are established with an effective date of Sept. 1, 2021. Agencies need to update the fiscal year-end ticket by either copying the fiscal 2021 budget to fiscal 2022 (indicates no changes or only a few minor changes) or load the fiscal 2022 budget spreadsheet (indicates a large amount of changes, 100 or more).
 - Agencies must enter all position changes effective prior to Sept. 1, 2021, and job data actions prior to Aug. 31, 2021. Active positions become inactive beginning Sept. 1, 2021. Agencies need to inactivate positions and make all changes before 5:00 p.m. on Aug. 31, 2021.
 - Agencies need to review employees on disciplinary reduction and temporary assignment. Agencies need to update these before 5:00 p.m. on Aug. 31, 2021.
 - Agencies need to inform managers and employees of the outage dates to ensure that all date-sensitive August transactions are processed ahead of the outage and all employees are aware of the outage.

- **After** the fiscal year-end close process concludes, be aware of these few reminders:
 - Agencies need to verify that all employees were updated for the new fiscal year. Specifically, verify that all active employees have an *action reason F22* row and terminations effective Sept. 1, 2021, (or earlier) do not have a *9/1 fiscal year 2022* row.
 - Agencies can use the *Personnel Changes Report in CAPPS Report* (NavBar>Workforce Administration>CAPPS Reports>Personnel Changes Report).
 - Open enrollment file is on Sept. 3, 2021. Agencies can review the *CAPPS ERS Inbound results* to check employees' benefit elections.
 - Agencies need to process all salary actions effective Sept. 1, 2021, to ensure the *9/1 Annual Base Benefit Rates (ABBR)* or *insurance salary* is correctly calculated.
 - Agencies need to complete execution of the September payrolls. Any *Pre-Distribution Audit Report (PDAR)* exceptions must be resolved before confirming September's payroll.
 - Remind employees of the Sept. 1, 2021, deadline for entering annual leave entries.
 - Complete the *annual-to-sick leave* conversion process.
 - Once the *annual-to-sick leave* conversion process is complete, agencies can process the *leave liability* report in CAPPS. Deploying agencies will receive their *leave liability* report information in the fiscal year-end ticket no later than Sept. 10, 2021.
 - Once the *leave liability* report is complete, agencies can run the *Sick Leave Pool (SLP) fiscal year* process to update balances.
 - Emergency leave reporting for fiscal 2021 is due on Oct. 1, 2021. On Sept. 25, 2021, CAPPS loads leave data to the Emergency Leave Reporting web application.
 - Run the TX_TL_SB73_EMERGENCY_LEAVE_RPT query before Sept. 25, 2021.
 - Following the emergency leave report process, agencies can complete the military rollover process. This can be done after Sept. 30, 2021. Ensure all military leave has been entered before running the rollover process in October or November 2021.
- Important dates:
 - Aug. 6, 2021 – The test version of the *mass reorg* spreadsheets must be attached to the fiscal year-end ticket. The CAPPS Production Support staff will run a test and provide the results to agencies for verification.
 - Aug. 20, 2021 – The final *mass reorg* spreadsheets must be attached to the fiscal year-end ticket. The test version of the *budget load* spreadsheets must be attached to the ASP ticket so that the CAPPS Production Support staff can run a test and provide the results to agencies for verification.
 - Aug. 31, 2021 – The final *budget load* spreadsheets must be attached to the fiscal year-end ticket.

VIII. Discussion Topic: CAPPS Recruit Onboarding Module Deployment (Rebecca Kelly)

- This is an optional module available for CAPPS Recruit agencies.
- The onboarding (transitions) module will:
 - Manages activities related to hiring a new employee
 - Initiate after a candidate has accepted an offer
 - Reduce time spent in New Employee Orientation
- Agencies can have agency-specific processes, assign tasks to candidates or employees and send email notifications for the assigned tasks.
- Tasks can be assigned to candidates, hiring managers, recruiters, non-HR groups and more.
- Tasks may include:
 - Reading and acknowledging a document
 - Completing and electronically signing an online form, including the I-9
 - Taking a course and uploading the completion certificate
 - Email notifications
- The average deployment timeframe is approximately 14 to 16 weeks.
- Agencies can request the module through an ASP SR.

IX. Discussion Topic: Statewide User Acceptance Testing (Saundra Farley)

- Beginning this month, CAPPs User Acceptance testing has two phases:
 - First phase — statewide testing completed by CAPPs Support team for five days.
 - Second phase — agency testing (this remains the same as it is currently).
- New statuses were added to ASP that notifies agencies when the CAPPs testing begins — allowing agencies time to prepare for the second phase of testing.
- Once the second phase (agency testing) is ready, the status updates and notifies agencies of the update.

X. Discussion Topic: Changes in Payroll Deduction Authorization Process for Employee Organizations (Wesley Green)

- As of June 20, 2021, employees submit the form **and** agencies accept the form directly from the employee.

XI. Upcoming HR/Payroll User Group Meetings

- Tuesday, July 27, 2021
- Tuesday, Aug. 24, 2021